

Turf Strategic Investment Advisory Panel meeting summary

Meeting Title:	Turf Strategic Investment Advisory Panel
Meeting Date:	Thursday 4 April 2019 1:24 pm – 5:12 pm, Sydney Friday 5 April 2019 8:30 am – 1:14 pm, Sydney
Meeting Objectives:	<ol style="list-style-type: none"> 1. Review Turf R&D and Marketing Program. 2. General updates from previous SIAP meeting held on 16 and 17 August 2018.

Meeting Participants:

Name	Role	Name	Role
Michael Worthington	Chair	Hort Innovation	
		Jon Vatikiotis	Relationship Manager
		Neil Burgess	Fund Manager
Turf SIAP		Alison Anderson	Fund Manager
Simon Adermann	Advisory Panel Member	Anthony Kachenko	R&D Lead
Ross Boyle	Advisory Panel Member	Byron de Kock	R&D Manager
Anthony Heilig	Advisory Panel Member	Bianca Cairns	R&D Manager (by phone)
Sarah Mason	Advisory Panel Member	Brenda Kranz	R&D Manager (by phone)
Robert Prince	Advisory Panel Member	Jane Wightman	Relationship Manager
Terry Sellick	Advisory Panel Member	Olivia Grey	Marketing Manager
Lawrence Stephenson	Advisory Panel Member (Day One)	Louis Williams	Fund Analyst
		Guests	
		Jenny Zadro	Turf Australia
		Grant Leslie	Balmoral Group
		Sam Miller	Balmoral Group
		Andrew Geering	University of Queensland
		Jessica Page	IPMT (by phone)
		David Hanlon	The Right Mind (by phone)
		Minutes	
		Miriam O'Brien	Independent Minute Taker

Apologies: Darren Kirkwood, Anthony Heilig, Lawrence Stephenson (Day Two)

Location: Hort Innovation Sydney

Next Meeting: 29 and 30 August 2019

Overview

The SIAP meeting was held on the 4 and 5 April 2019. The meeting focused on R&D and Marketing updates along with investment advice.

Financial Update

Review Marketing & R&D Financials

Hort Innovation Fund Manager, Neil Burgess, presented the financial update.

He advised of updated data for February 2019, which was obtained after the agenda papers had been distributed. These data showed levy income was around 0.6% above that of the same period last year, with R&D \$366,725 and Marketing at \$91,682.

Points raised in discussion included:

- The revenue is broadly consistent with what is being seen in the market, however, it varies from area to area with production in some areas down partly because of weather conditions.
- Levy income is not forecast to slow down.
- The Fund Manager said the Turf Fund is in a solid financial position.

The meeting was advised Alison Anderson of Hort Innovation will be assuming the role of Fund Manager for Turf.

Gap Analysis Update

Hort Innovation Fund Analyst, Louis Williams, introduced himself and gave a PowerPoint presentation of the SIP expenditure analysis. He described the background to the analysis, the steps in the analytic process, and the teams involved followed by the outputs from the analysis. The expenditure data is for the period of the current SIP, from 1/7/16 to 31/12/18.

R&D Concept Review

There were a number of concepts discussed on the day. Following is a sample of concepts requiring industry advice. Further updates to be provided once the procurement process is finalised.

- **Concept 2612 - NxGen Turf Program (SIP Outcome 3)**
- **Concept 2762 - Sensing technology for Turf Production (SIP Outcome 3)**
- **Concept 2800 - Masterclass in Horticulture Scholarship for Small Industries (SIP Outcome 4)**

Market Development Manager Update (Turf Australia Projects update)

The Turf Australia Market Development Manager, Jenny Zadro, gave the update on Market Development with a PowerPoint presentation (TU16002). This included an update on parties engaged over the year; events attended; urban heat island effect project in Adelaide with comparisons of natural vs synthetic turf; conferences such as Landscape Irrigation Conference and Exhibition and the Parks and Leisure Aust conference; and promotional and other activities that could be regarded as related to market development. (Jenny Zadro advised that all events were not necessarily core market development activities.) She also reported about project outputs and activities from state associations. The presentation addressed 2019 workplans and a list of national key targets in 2019.

Update on Industry Statistics

Jenny Zadro gave an update on this project, with a presentation. She said there has been a drop in the number of growers and that less turf has been produced but the value of the turf sold has increased.

Communications

The Turf Australia Market Development Manager said the only change is to the role of the Communications Manager, who will be leaving Turf. A communications service provider is to be contracted and there will be a meeting next week to commence the work.

Marketing Update

The Hort Innovation Marketing Manager, Olivia Grey, presented the strategic marketing plan update with a PowerPoint presentation. She reported on the 2018/19 activation, insights, learnings and implications and flagged the 20/21 marketing plan.

The Marketing Manager will be absent from 19 April to 13 May and advised Elisa King can be contacted during this time.

The Marketing Manager said all is going well for turf, except in WA where it is not as good, and asked the SIAP if there were any issues, trends or feedback. Points raised in discussion included:

- This has been the best three years, but there is probably a testing time ahead with some volume loss.
- Social strategy discussion:
 - The tone of the social strategy is shifting to become less “blokey”.
 - There was a question about whether people on social media ask turf-related questions. The Marketing Manager said there are a lot of turf-related questions.
 - There was further discussion about whether people will give wrong answers, and the extent to which wrong answers are corrected by more knowledgeable people. The Marketing Manager said there is a stockpile of answers to hand and if a particular question cannot be answered the person asking is referred to a local turf provider.
- Contract with Nathan Hindmarsh:
 - There was a comment about the economic modelling project, linking it to the importance of having a spokesperson to relay information to the general community. There was a comment that Nathan Hindmarsh has credibility.

2019/2020 program

The Marketing Manager presented the proposed timetable and proposed budget going forward. The SIAP supported the plan elements.

Presentation on progress with the Couch Mites project by IPMT

Jessica Page joined the meeting by phone and gave a presentation on the project. She said the workshop attendance was insufficient, so it was followed up with farm visits to seek information on the management of couch mites. The team now has a much better idea of the issues. The team has found that the turf industry is not facing a crisis with couch mites. Most growers are doing a good job of managing mites and they only pose a major problem on a few sites.

Hort Frontiers Green Cities Fund update

The Hort Innovation R&D Manager, Byron de Kock, gave an update on the Green Cities Fund. Points raised in discussion included:

- GC15002 Which plant where, when and why database for growing urban green space: The R&D Manager indicated he would be happy to seek opportunities for incorporating turf better, in consultation with Simon Adermann and Sarah Mason.
- The R&D Manager is proposing a joint one-day session with the Turf SIAP, the Nursery SIAP and Green Cities EAP followed by a second day where the three groups would convene separately.
- The R&D Manager said he will send the PowerPoint presentation to the SIAP.

Growing Leaders project update

David Hanlon of The Right Mind joined the meeting by phone.

David Hanlon gave an update with a PowerPoint presentation. The update included a snapshot of overall and turf-specific applications in terms of invitations and responses over the past three years, as well as turf people who completed the program.

Points raised in discussion included:

- The quality of applications has dropped in 2019 compared to 2017 and 2018.
- Communication has topped the list of skills and knowledge sought by applicants every year.
- There was a question about what happens after the project is finished. The consultants said that having the platform means the data can be updated going forward. The consultants do maintenance and updating for other clients. The cost depends on the number of updates and in this case would probably not be that expensive.

Hort Frontiers Leadership Fund Update

Jane Wightman joined the meeting by phone

Jane Wightman gave an update on the Leadership Fund. She said the Leadership EAP met recently. The themes of the program are:

- Promoting career pathways,
- Retaining employees and encouraging leadership positions, and
- Driving research capacity.

Jane Wightman invited the SIAP to let her know of any items of interest.

The Market Development Manager at Turf Australia said she is currently in discussion about course development for local TAFE colleges, and Garden Council funding has just been approved.

Improved capacity for integrated disease management of couch smut update

Andrew Geering joined the meeting.

Andrew Geering from the University of Queensland gave a presentation with an update of this project. He spoke very highly of the post-doc, Nga Tran, who is working on the project.

Andrew Geering described the disease symptoms and the qualitative and quantitative impacts of couch smut. He listed some of the gaps in knowledge; distribution in Australia; information from farms surveyed; a list of cultivars affected by couch smut, which are mostly older cultivars; fungal collections; a molecular test identifying the pathogen by PCR; and other aspects. In summary, he said the project was fairly well on target and the team is working as hard as it can to complete the work within an ambitious timetable (two years).

TU17006 Economic, environmental, social and health impact and benefits of the Turfgrass and Lawncare Industries in Australia

Grant Leslie and Sam Miller of the Balmoral Group Australia joined the meeting. Adam Briggs from Hort Innovation joined the meeting.

Grant Leslie and Sam Miller of the Balmoral Group gave an update on TU17006, with a PowerPoint presentation. They described the objectives of the project, the outputs and what is required to deliver the required outputs. The presentation included a diagram illustrating the input-output model and a spreadsheet and chart showing how the model is constructed; a Venn diagram of high-level non-market impacts – environment, economic, social and health benefits and values of some items within these; a diagram said to show the kWh required for cooling, and how turf cover by type is estimated across suburbs. Urban heat island effects in Canberra were plotted on a chart.

The output from their work will be available as interactive searches. Points raised in the discussion included:

- There was a comment that this analytical tool will be very powerful.
- The consultants said that if there was a situation where a standard report was required for a particular purpose, a template could be developed.
- The consultants were asked if they were surprised by the value of turf. They responded they were not surprised.
- There was a question about whether willingness to pay is a well-established metric. The consultants said the metric is based on an Australian study, done in Sydney, so they are fairly confident it represents Australian values, with normal caveats. The studies are not done very often in Australia in part because of cost. It is accepted by Treasury Departments all around Australia.
- There was a question about what happens after the project is finished. The consultants said that having the platform means the data can be updated going forward. The consultants do maintenance and updating for other clients. The cost depends on the number of updates and in this case would probably not be that expensive.

Next 12 months meetings

The next meeting will be changed from 20 and 21 June to **29 and 30 August 2019**, at a location to be determined.

The decision on the timing of the following meeting will be made at the August meeting.

Contact

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